

## Montana Developmental Disabilities Self Direction Employer (use this tool for Agency with Choice)

\*\*For more information on Self Direction go to: <http://www.dphhs.mt.gov/dsd/ddp/selfdirection.shtml>

\*\*For more information on Acumen Fiscal Agent and Montana information go to: <https://www.acumenfiscal.com>

When the self-directed employer authority option is chosen for an individual, there are TWO lines that need to be built in the person's cost plan (ICP). You will find self directed Service Category drop-down menu (in the ICP system) as CAW Self Directed, SCWL 0208 waiver it's listed as Self Directed Services. Pick the appropriate Service Detail ONE line being the Fiscal Agent Admin Fee. **The ICP Services or Hour Calculator create amounts in the service lines.** The tool will get you close, but will not be perfect. Managers do not have to use the tool. The Case Manager should still monitor usage to ensure there are enough funds. See instructions below to use the tool. A summary of amounts are determined should be noted in the Comment section when building the ICP box to the right gives the fees to consider for the Fiscal Agent line in the cost plan.

### ICP CALCULATOR TAB

Only yellow cells can be changed

See below

The main grid on this tab will calculate what dollar amounts in the ICP to create for the Service lines. The tool can also be used to estimate ICP service lines in other ways.

- 1 Enter person's name and AWACS ID.

The structure of the fiscal agent fees has changed and is no longer related to dollar amounts. Depending on the information available to the Case Manager, a simple calculation of monthly amounts in the fiscal year can be done. OR, if there is an annual amount, then the annual amount can be entered in the cost plan. Or this tool can be utilized. Enter the annual amount in column D, or direct you have to work with.

- 3 In column E, enter number of months left in this FY OR months in the date span if the service is for a date span. Use whole month increments, regardless of start date within a month. Do not to exceed 12 months in this tool.

- 4 Using the annual amount entered in column D, column F gives you the prorated service dollar amount that should be used to create the corresponding ICP service line(s). Column G gives you the monthly amount (FY) using the same annual dollar amount you entered in column D (begin new service line in column H). If you are figuring costs for 12 months (column E equals 12), then F & G results should be the same. If the projection won't be different from year to year, there is no need to end date any of the ICP lines. If you end date the ICP lines, make sure to consider Step 5 if you end date the ICP lines.

- 5 **\*\*IMPORTANT\*\*** If number of months left in this Fiscal Year or months in the date span in column E and G do not match, follow the directions and create a new line in the ICP using the results in column F for the full annual amount.

- 6 Steps 4 & 5 should be done at the same time on the ICP, and submitted together for Regional Review.

- 7 If any subsequent changes occur during the current year, fill out the toolbox again following the steps above. If you are projecting future years, the projections already exist for Self Direct services. **Remember to also Edit any future lines for the next year.**

### Hours Calculators (scroll right and/or down from the main grid on the ICP Calculator to find the calculator you need.)

Depending on what you are trying to figure, there are additional calculators which will assist you. **ALL CALCULATORS ARE FOR THE CURRENT FISCAL YEAR.** If you are trying to figure something for a full year, the Year (column E) is 12. These are estimates to assist you and may not be exact.

**Scroll right** - Based on entries from the steps 1-4 above, this calculator will let you know how many hours you will get. You will enter the average wage in column K. Column L will give you the total hours.

**Scroll down** - This calculator starts with the service hours you desire per month. You will enter the average wage (rows 33 & 34). It will calculate an estimate of the Annual amount you will need to enter in the ICP for service hours and the Fiscal Agent Fee. This is helpful to project one service and adding several of these projections together will NOT give you a total.

## er Authority ICP Calculator (do not

[lagent.com/states/mt.aspx](http://lagent.com/states/mt.aspx)

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**or will help you**  
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**Enrollment = \$150.00**  
**PMPM = \$62.00/month**  
**New Employee = \$50**  
**per employee**  
**Monthly Check**  
**Transaction Fees:** 0-  
2 checks: \$0 (included  
in PMPM) 3-5  
checks: \$50.00 (plus  
PMPM fee) 6+  
checks: \$100 (plus  
PMPM)

The blue box  
gives you the  
Fiscal Agent  
fees effective  
2/1/14. Figure  
the Fiscal Agent  
fee separately  
using the Fiscal  
Agent Fee  
Instructions and  
Calculator

for other tools on this tab

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correct result.